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TRAVEL EXPRESS USER MANUAL

NON-STATE EMPLOYEE TRAVELER INSTRUCTIONS

INTRODUCTION

The State of Idaho Travel Express Reimbursement application is used to submit travel reimbursements online. The application is available from the secure logon on the State Controller's web page at: http://www.sco.idaho.gov/.

The Travel Express application is intended to provide a more efficient and effective method of submitting travel reimbursements. Agencies and contractors will be able to view documents that are in process or research documents that have been paid.

NOTE: If you have questions or need further assistance, contact the State Controller's Office, Division of Statewide Accounting Helpline at dashelpline@sco.idaho.gov or STARS_Security@sco.idaho.gov. If e-mail is not available, call the DSA Helpline at 208-332-8827.

OVERVIEW FOR NON-STATE EMPLOYEES

In order to process documents in Travel Express, both you and the agency for which you are contracting must be setup in Travel Express. <u>Click here for instructions about getting setup in Travel Express</u>, including links to the necessary forms.

Your setup information in Travel Express will include information for routing and approval of the Travel Express documents and that your documents to be sent electronically to the Statewide Accounting and Reporting System (STARS). For this, you must be set up in the STARS Vendor Edit Table. Your billing agency will be able to assist you in the STARS vendor setup process.

Once setup, you can log on to the Applications page of the State Controller's Office Web site, choose Travel Express, and begin the Create a Travel Voucher process. Note that you cannot use the Multiple Travel Voucher option. You cannot have a designee create and submit Travel Express Documents - you must create and submit Travel Express documents for yourself.

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ACCESSING THE TRAVEL EXPRESS APPLICATION

- 1. Go to the State Controller's web page at: http://www.sco.idaho.gov/
- 2. Click Logon.

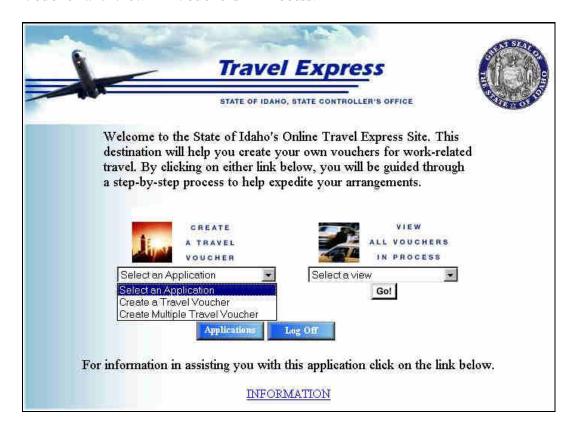


- 3. Type your **User Name**, **Agency Code**, and **Password**. The State Controller's Office will have provided you with this information. The Agency Code for a vendor non-state employee is "000". If you have any web access problems at this point, contact the SCO computer operations helpdesk at scohelpdesk@sco.idaho.gov or call (208) 334-4808.
- 4. Click **Travel Express** to go to the Travel Express home page.

TRAVEL EXPRESS HOME PAGE

NOTE: To use Travel Express, your browser must have all cookies enabled.

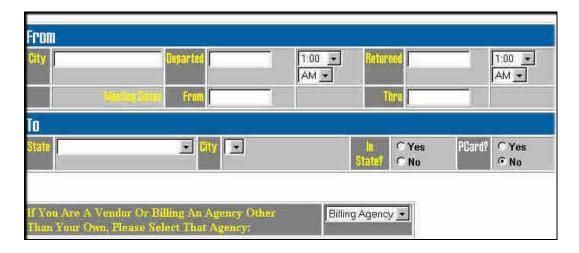
On the Travel Express home page are two icons with drop-down lists: **Create a Travel Voucher** and **View All Vouchers in Process**.



- Click **Information** at the bottom of the Travel Express home page for links to the Travel Express Manuals, to the State of Idaho Policies on Travel, and to Federal Per Diem Rates.
- Click **Applications** to return to the Applications Menu page or **Log Off** to log off the SCO web site.

CREATING A TRAVEL VOUCHER

1. Select **Create a Travel Voucher** from the **Select an Application** list under the **Create a Travel Voucher** icon (see above). You will see your name and vendor number and data fields in which to type you travel information:



2. In the **From** section:

- a. Type the name of the city from where you left.
- b. Type the date you departed in mm/dd/yyyy format (e.g., 07/15/2005).
- c. Select the time departed.
- d. Type the date you returned in mm/dd/yyyy format.
- e. Select the time you returned from the drop-down list. NOTE: Travel cannot exceed 14 continuous days.
- f. Type the meeting dates both **From** and **Thru** in mm/dd/yyyy format.

3. In the **To** section:

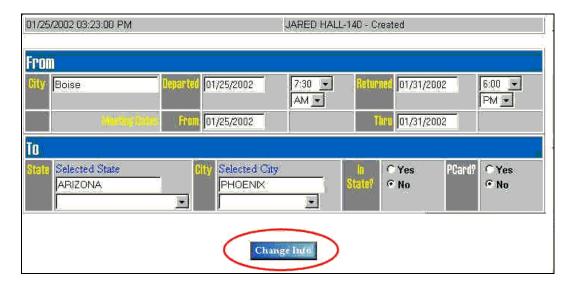
- a. Select the State where you are traveling to from the drop-down list. This will populate the city/county table for your next selection.
- b. Select the city you are traveling to from the drop-down list. If the city is not listed, but the county in which the city resides is listed, select the county.
- c. If neither the city nor county is listed, click **Other**.
- d. Type the name of the city in the Script Prompt dialog box and click **OK**.
- e. Select whether the destination is in state or not.
- f. If Travel Express presents a selection for P-Card, typically you would not be using one
- g. Select the agency with whom you are contracting from the drop-down list.

4. When finished, click **Submit** or click **Exit-No Save** if the information is incorrect or you want to start over.

After clicking **Submit**, the Travel Express reimbursement page is displayed. This page begins with the information from the previous screen and adds additional sections:

- Claimant Information
- Mode of Travel
- Travel Detail Information

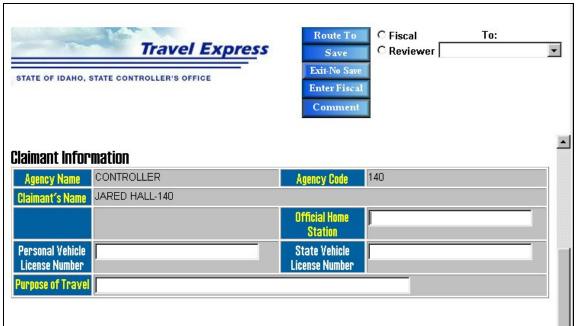
Also, additional menu buttons appear on the page. For example, you can modify the travel locations, and then click **Change Info** to save and update the per diem information.



CLAIMANT INFORMATION

If necessary, scroll down the Travel Express web page. Follow these steps for the next portion of the **Claimant Information** section:

- 1. Type your **Official Home Station**.
- 2. Type either your **Personal Vehicle License Number** or the **State Vehicle License Number**, depending on the vehicle that you used.
- 3. Type an explanation for the **Purpose of Travel**.
- 4. Add comments at any time by clicking on **Comment** at the top of the screen. Comments can be added throughout the Travel Express document. If comments have been added, a list the number(s) will appear which are linked to the actual comments. Clicking on the number will open each comment.



TRAVEL DETAIL INFORMATION

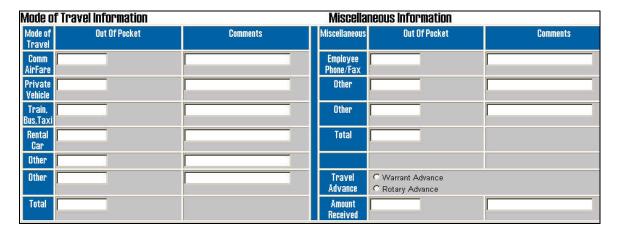
Travel detail information is automatically populated from the Federal per diem tables.

Date	Meals	Lodging	Personal Vehicle Miles Driven	Comments
7/15/2005	\$30.00			
7/16/2005	\$30.00			
7/17/2005	\$30.00			
7/18/2005	\$30.00			
7/19/2005	\$30.00			
7/20/2005	\$0.00			
Totals	\$150.00			

- 1. Enter the amount spent on meals. If your agency has selected default amounts to be displayed, the maximum amounts for meal per diem will be in the correct spaces by default. If you need to override the entered amount, enter the corrected amount as long as it is less than the maximum allowable amount. (Travel Express will allow only per diem limit. Entering more than the per diem will display an error.)
- 2. Enter the reimbursement amounts spent on lodging. If lodging is billed directly ("direct-billed"), note that in the "Comments" area.
- 3. Enter personnel mileage, if applicable. If a personal license plate number was not added earlier, you will not be allowed to enter the mileage. Travel Express will calculate the dollar amount using the rates approved at the time of travel.
- 4. Type your comments, if necessary, for each line item or click **Comment** and type in the comment box.

MODE OF TRAVEL AND MISCELLANEOUS INFORMATION

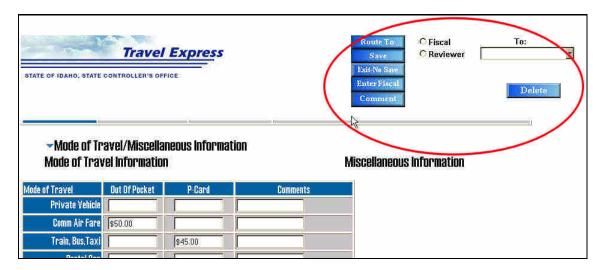
Enter any "Out of Pocket" expenses (personal funds or funds not advanced by the State) either by **Mode of Travel** or **Miscellaneous Information**. Mode of travel refers to private vehicle, air fare, train, bus, taxi, etc.



- 1. Enter any travel related expenses under **Mode of Travel Information**.
- 2. Enter any miscellaneous expenses under **Miscellaneous Information**.
- 3. Type comments next to the expenditures, if necessary.
- 4. Formulas within Travel Express will calculate the total due.

ROUTING THE TRAVEL EXPRESS DOCUMENT

After completing the expense document, it is ready to route to **Fiscal** or **Reviewer**. Check the Travel Express Document to verify the information.



If the Travel Express Document is complete and ready for submission:

- 1. Select either **Fisca**l or **Reviewer**, as instructed by the agency which is reimbursing you.
- 2. Select the appropriate name from the drop-down list.
- 3. Click **Route To**. The document is processed and sent to the person selected.
 - If the document needs additional information or you are not ready to route the document, click **Save** to save the document so that you can complete it later.
 - To delete the Travel Express Document without submitting it, click **Delete**.
 - To exit the Travel Express application without saving any information, click **Exit-No**Save

After the agency approves the document, a warrant or an electronic fund transfer (EFT) will be generated.